

Appendix H: Support and Training Requirements

Customer Support Estimations

This document will outline the estimated impact of the various recommendations put forth by the CCEI committee on the NC State University Help Desk. This report will also address any changes or requirements that will be needed to successfully support these initiatives.

These recommendations are valid regardless of the decision made by the Chancellor regarding email and calendaring.

Staffing levels/levels of service: The NC State University Help Desk is not currently staffed to handle the levels of service currently in place for administrative users on campus. It has been traditionally staffed for student and staff assistance, with resolution times in hours and days as opposed to minutes and hours, and adding in the administrative users places stress not only on our service levels but our overall employee criteria and placement.

Currently, the Help Desk is staffed primarily by temporary student employees that handle both basic triage and advanced troubleshooting. These students are supplemented by a small full-time staff. ETSS Client Services has tried using student staff with their administrative clients in the past, with very negative results. Also, there has been a large push lately at the campus to limit the access to secure systems that temporary staff members are able to attain. From both a security and a perception standpoint, having student workers triage administrative clients could potentially cause issues. In order for the Help Desk to be successful at Tier 1 support of the administrative clients, these temporary workers should be replaced by permanent FTE positions. To maintain current levels of support, 80 hours of full-time coverage would be required, and if service is to escalate to an acceptable standard of support, 120 hours, or 3.0 FTE would be needed.

At current levels of service, great emphasis is placed on local college or departmental support for various desktop issues. ETSS Client Services also acts in this capacity, with its "department" being administrative users of GroupWise and the administrative desktop environment. In the debate between centralized or decentralized administration of an email/calendar solution, it is important to realize that administration and support are separate considerations. A centralized solution can have decentralized support. The NC State University Help Desk is not staffed or equipped to handle onsite requests or the daily needs of the various departments on campus that already have local support. For this reason, it is crucial to have these departmental units intact to ensure that local problems can be escalated quickly to local support. The same applies to ETSS Client Services – there is no need for the NC State University Help Desk to duplicate the work that is already being done in Peele Hall. In this proposal, ETSS Client Services would act as a Tier 2 escalation unit, able to provide extended support for email/calendaring as well as their usual support needs above and beyond what the NC State University Help Desk provides at Tier 1. However, if the ETSS support model will need to be extended to the whole of campus, where hands-on assistance to all faculty and staff is required, a significant increase in ITD staffing will be required. Rough estimates would necessitate 120-200 hours of permanent full-time coverage to meet this need.

Administrative and other access to tools and services: Although the NC State University Help Desk primarily provides Tier 1 support, there is still a substantial need for access to tools and resources regarding the email and calendaring system(s). Currently, Help Desk staff can access users' email quota, account information, folder usage patterns, troubleshooting tools and documentation, and other useful pieces of information. In order for the Help Desk to continue to provide the access necessary to support this campus, it would need similar tools for whatever new system is chosen. If the use of temporary staff prohibits the use of these tools from a security standpoint then, as mentioned above, the Help Desk will need adequate permanent replacement staff.

Access to developers/Tier 2 staffing: The department (or departments) that assume control of some or all of the email/calendaring solution will have to be readily available to Help Desk staff at all times. This access will extend to the developers and maintainers of the system servers and software as well as any support staff. Daily, routine access could be restricted to the Remedy call-tracking system, but emergency situations will require telephone and/or pager access to these individuals. Part of this access will include an escalation procedure worked out between the Help Desk and the department(s) that lays out specific procedures for what calls and customers can be escalated, at what priorities, etc.

Executive Summary

In order for the NC State University Help Desk to support a campus-wide email and calendaring initiative, several changes will have to occur regardless of which solution is chosen:

- The temporary student employees will have to be replaced with 80-120 hours of full-time permanent staff.
- College and departmental support units (including ETSS Client Services) will have to be available to continue the level of service currently provided by these units. If the NC State University Help Desk is to take over providing this level of service, an additional 120-200 hours of full-time permanent staff would be needed to act as a Tier 2 support team.
- The NC State University Help Desk would need documented access to the administrators and support staff in the department or departments that administer the system and its servers and services. This access would be in the form of email, Remedy call-tracking software queues, telephone, and pager access, depending on the severity and impact of the problem.

Submitted by Chris King, NC State University Help Desk

Training Requirements

Transition / implementation stage

Training and education of our end-users is vital during the transition and implementation stage. We heard this over and over again from our focus group participants. They are aware and we believe will be accepting of change since it will make the campus as a whole stronger. However, they emphasized the critical role that education and training will play during this transition stage.

We will need to keep the campus informed of our progress through various educational endeavors and provide relevant, subject-and skill level oriented training. It is clear that we currently do not provide enough education and training to the campus community – this means faculty, staff, and students – on the basics or advanced topics concerning email and calendar.

Following are suggestions for personnel during the transition / implementation stage. Following the transition stage are suggestions for staffing levels on an on-going basis for the campus community.

Personnel for transition / implementation stage

Existing staff:

- Designate a person to oversee the implementation / transition training phase. This person would be responsible for coordinating educational announcements, coordinating development or purchase of training materials, coordination of classes and on-line training materials and coordination of units up for training / transition. Person would have the ability to pull on others within the central IT unit for assistance as needed.
- Hire approximately 15 temporary IT employees full-time (\$20/hour) to provide training and support on the new system. Move customers over by unit with temporary staff on-site when their unit is actually moved.
- Develop training materials specific to the system being implemented and/or modify existing materials.
- Develop educational materials and web site to keep campus up-to-date on the project and its implementation.

On-going education and training for email / calendar services on campus

To meet anticipated need of additional end-users and to fill the educational gap we see on campus, we suggest:

- 1 FTE dedicated to training and/or education
 - including creation of materials; customization of materials for NC State's environment; training (end-users and train the trainer classes/workshops)
- Investigate purchase of web-based training modules on tools currently in use to provide another training alternative (for both end-users and technical staff on campus)
- .5 FTE to assist with training, specifically development or coordination of training for technical staff to stay current.

It is important for this university to recognize that we have, for too long, not invested well in our education and training endeavors. While there are good training programs in place for creating web pages and other productivity tools, we have not invested well in the basics of services like email and calendar. Additionally, units like ITD have typically only offered their services to faculty, staff and graduate students. We must reach out more to undergraduates and we cannot assume that people know how to use email and calendar tools when they arrive on campus.

Develop and offer workshops that provide more of the basics of "how-to", as well as more advanced topics; offer shorter workshops and provide opportunities for learning in several formats (hands-on, web-based, workshops).

Opportunities exist on campus to coordinate basic training and we need to tap into these existing resources better. One excellent example is the opportunity we have with New Employee Orientation and the latest endeavor coming out of HR, their QuickStart program.